

DUTY STATEMENT

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| | | EFFECTIVE DATE |
| BRANCH Benefits & Services | POSITION NUMBER (Agency – Unit – Class – Serial) 815 - 434 - 5393 - 006 | |
| DIVISION/UNIT Service Retirement / Benefit Calculation Team | CLASS TITLE Associate Governmental Program Analyst | |
| INCUMBENT NAME Vacant | WORKING TITLE Associate Benefit Calculation Analyst | |
| CalSTRS is dedicated to securing the financial future and sustaining the trust of California's educators through customer service, accountability, leadership, strength, trust, respect, and stewardship. | | |
| Under the direction of the Pension Program Manager I, Benefit Calculation Team (BCT) Manager, the Associate Governmental Program Analyst (AGPA) works independently and in a team environment on the more responsible and complex assignments exercising a high degree of initiative, independence, and good judgment in the course of interpreting and applying laws, policies, processes, procedures and administrative directives. The AGPA represents the BCT on the Pension Solution project and serves as a subject matter expert, independently performing and providing expert knowledge on complex benefit calculations and demonstrating expertise and ingenuity with the START mainframe in processing complex benefit payments. | | |
| % of time performing duties | Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first. | |
| 30% | ESSENTIAL FUNCTIONS <u>Pension Solution Data Quality Controller:</u> Participate in Pension Solution activities, including joint application development (JAD) to identify and develop business requirements for BenefitConnect; write test execution checklists (TEC) for user acceptance testing (UAT); serve as an expert resource and perform UAT and execute post implementation validation (PIV) to ensure system modifications are in compliance with expected results. | |
| 15% | <u>Reviews, Analyzes, and Processes:</u> Research and analyze data and member cases to accurately calculate member benefits; independently review specialized manual calculation workload cases and determine accuracy and compliance with applicable laws, rules and regulations; research laws, policies, and regulations; prepare fact sheets and recommend appropriate course of action for resolution; track and maintain written documentation in support of decisions made to remedy payment discrepancies or issues; independently review and process complex benefit calculations with particular emphasis on specialty workloads, which often require using manual worksheets; partner with other business areas or other departments to obtain member information; employ expertise and ingenuity using the START mainframe; assist in drafting issue memos to senior leadership on complex issues or cases as needed. | |
| 10% | <u>Customer Service:</u> Respond timely and professionally both verbally and in writing to internal and external inquiries related to complex benefit calculation; assist colleagues in responding to the most complex and/or sensitive inquiries from payment recipients seeking explanation regarding their benefits and payments; develop rapport with peers in and outside of Service Retirement; work collaboratively with peers and leadership throughout CalSTRS to obtain information necessary to administer benefits; coordinate with program area staff to ensure development, dissemination and application of consistent and accurate information, procedures and seamless service to CalSTRS customers. | |
| 10% | <u>Process Documentation and Improvement:</u> Review and document current business procedures and processes; identify and recommend process improvements to achieve increased productivity and improved accuracy; coordinate and maintain regular updates to documented processes and procedures; analyze current manual forms and processes for possible automation; make recommendations to the leadership team and/or web services and solution during implementation. | |
| 10% | <u>Training:</u> Develop and deliver training curriculum in a formal classroom setting or informal on-the-job training; vet training issues with subject matter experts; follow-up with trained staff to ensure they received a clear understanding of the taught skill or knowledge; lead the effort in the knowledge transfer process on the BCT; work as the liaison when workload is moved from one individual to another to ensure that the knowledge transfers thoroughly to the person who will be performing task in the future; partner with peers throughout the organization to ensure SR staff receive timely, effective learning opportunities on all business, technical, procedural, legislative, and system changes; identify opportunities for program and staff development. | |

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| 10% | Quality Control: Ensure accurate and timely retirement benefits through monitoring and quality control of work assignments and inventory; carefully follow established processes and procedures to ensure efficiency and accuracy; routinely perform quality control review of BCT staff deliverables as needed. |
| 10% | Statistics & Data Analysis: Collect, record, and analyze data related to daily operations to identify indicators, provide information about SR trends, and assist in workflow management and resource alignment and planning; provide input for strategic and business planning and present recommendations for improving customer satisfaction and employee performance; prepare statistical reports and communicate with leadership on policies and program alternatives to achieve increased productivity and improved consistency and accuracy within SR. |
| 5% | MARGINAL FUNCTIONS Team Participation: Serve as a resource/team member on cross functional teams to establish and maintain timely and accurate payment of benefits in support of the SR vision and mission. |

COMPETENCIES

Core Competencies. All employees are responsible for understanding and demonstrating CalSTRS' core competencies:

- Adaptability/Flexibility
- Communication
- Customer/Client Focus
- Teamwork
- Work Standards/Quality Orientation

Classification Competencies. All employees are expected to understand and demonstrate their position's CalSTRS class competencies:

- Analytical Thinking
- Creative Thinking
- Ethics and Integrity
- Forward Thinking
- Managing Work
- Organizational Awareness
- Planning and Organizing
- Technical/Professional Knowledge and Skills
- Thoroughness
- Written Communication

CONDUCT AND ATTENDANCE EXPECTATIONS

- Communicate effectively with individuals from varied experiences, perspectives and backgrounds
- Deal with individuals in a tactful, congenial, personable manner
- Must maintain consistent and regular attendance
- Adhere to CalSTRS policies and procedures
- Ability to support and model CalSTRS Core Values

Service Retirement Vision: Lead the way with stellar service, support of people and a culture of innovation and excellence.

Service Retirement Mission: Establish and maintain accurate and timely Service Retirement benefits.

WORKING CONDITIONS AND PHYSICAL ABILITIES REQUIRED OF THE JOB

- Prolonged periods of standing or sitting
- Work in a high-rise building, in an open space environment
- Ability to use a computer keyboard several hours a day
- Read from computer screens several hours a day
- Ability to move up to 10 pounds

Responsible for promoting a safe and secure work environment free from discrimination, harassment, inappropriate conduct, or retaliation by adhering to CalSTRS' policies and processes. Responsible for participating in mandated HR or EEO training workshops (i.e. Sexual Harassment, EEO, etc.).

815-434-5393-006

To be reviewed and signed by the supervisor and employee:**SUPERVISOR'S STATEMENT:**

- I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH THE EMPLOYEE
- I HAVE SIGNED AND RECEIVED A COPY OF THE DUTY STATEMENT

SUPERVISOR'S NAME (Print)

SUPERVISOR'S SIGNATURE

DATE SIGNED

EMPLOYEE'S STATEMENT:

- I HAVE DISCUSSED THE DUTIES AND RESPONSIBILITIES OF THE POSITION WITH MY SUPERVISOR
- I HAVE SIGNED AND RECEIVED A COPY OF THE DUTY STATEMENT
- I AM ABLE TO PERFORM THE ESSENTIAL FUNCTIONS LISTED WITH OR WITHOUT REASONABLE ACCOMMODATION
- I UNDERSTAND THAT I MAY BE ASKED TO PERFORM OTHER DUTIES AS ASSIGNED WITHIN MY CURRENT CLASSIFICATION, INCLUDING WORK IN OTHER FUNCTIONAL AREAS AS BUSINESS NEEDS REQUIRE

EMPLOYEE'S NAME (Print)

EMPLOYEE'S SIGNATURE

DATE SIGNED